



IN THIS EDITION

The Land Matrix Global Observatory: Towards a public tool to promote greater transparency in decision-making over land and investment at a global level

New data: Towards a more precise presentation of the large-scale land acquisition phenomenon



GET THE IDEA

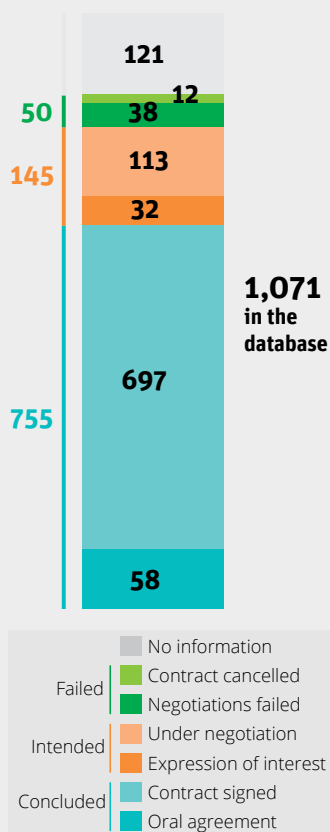
The aim of the Land Matrix initiative is to promote transparency and open data in decision-making over land and investment, as a step towards greater accountability. The Beta version of the Land Matrix Global Observatory was launched in April 2012 as a tool to promote public participation in building a constantly evolving database on large-scale land acquisitions (LSLA), and making the data visible and understandable. Since its launch, the Land Matrix has attracted a high degree of attention, and stirred some controversy. It provides valuable lessons on the

challenges and successes of promoting open data on practices that are often shrouded in secrecy. Based on these successes, challenges and the integration of new elements, a new version of the Land Matrix Global Observatory has been developed. It is being launched in June 2013. This newsletter presents the new version of the Land Matrix Global Observatory and details the on-going efforts by the Land Matrix partnership to build a public tool to promote greater transparency in decision-making over land and investment at a global level.

THE LAND MATRIX GLOBAL OBSERVATORY– TOWARDS A PUBLIC TOOL TO PROMOTE GREATER TRANSPARENCY IN DECISION-MAKING OVER LAND AND INVESTMENT AT A GLOBAL LEVEL

Overview

data as of 5 June, 2013



The Land Matrix – Basic concept

Since 2009, the Land Matrix Partnership has been systematically collating and verifying information on LSLA. It records projects that

- Entail a transfer of rights to use, control or ownership of land through sale, lease or concession
- Have been initiated since 2000
- Cover an area of 200 hectares or more
- Imply the potential conversion of land from smallholder production, local community use or important ecosystem service provision to commercial use
- Aim at agricultural production, timber extraction, carbon trading, mineral extraction, industry, renewable energy production, conservation, and tourism (focus in this newsletter: on agriculture)
- Are targeted at low and middle income countries

Four major challenges of assessing trends, scale, and nature of LSLA

1. **Definition of the phenomenon itself:** both the size criterion and the sector choice induce partialities, and eventually explain the often important differences in results and estimations.
2. **Quantification and assessment:** How do we measure the large-scale land acquisition phenomenon?
3. **Status of the land deals are rapidly changing:** The pace at which land deals are decided means that static databases very quickly no longer reflect the reality on the ground.
4. **Data availability and reliability remain problematic:** Most assessments of LSLA still have to rely mainly on media reports, but issues regarding accuracy also appear in sources considered to be more reliable.



It mainly focuses on transactions that involve foreign investors, although domestic cases have also been documented. The data come from a variety of sources that include media reports, reports by international organizations and NGOs as well as academic papers

based on field-research. Data also come from public participation, through a crowd-sourcing approach. As such, the interface invites users to comment on deals and to provide information on deals not included in the database.

TOWARDS A DYNAMIC AND PARTICIPATORY TOOL

In response to comments and to the above mentioned challenges, a new version of the Land Matrix Global Observatory interface is being launched. Among others, **two major enhancements are implemented.**

In first place, the new version of the Land Matrix Global Observatory captures dynamics of land deals through **two key variables:**

1. Negotiation status

- Intended deals: (1) Expression of interest, (2) Under negotiation
- Concluded deals: (3) Oral agreement, (4) Contract signed
- Failed deals: (5) Negotiations failed, (6) Contract cancelled

2. Implementation status

- (1) Project not started
- (2) Startup phase (no production), (3) In operation (production)
- (4) Project abandoned

Secondly, data behind the LSLA cases are no longer ranked according to their perceived reliability, but will directly be **related to their source**, facilitating to filter deals by the type of source. Thereby, users can judge themselves whether they consider the respective information reliable. This will also allow making more data available: only deals that do not fulfil specific minimum information requirements will be left out.

These methodological innovations, related to the rapidity at which the status of existing and potential land deals change and the paucity of information readily available, imply that a greater emphasis is placed on first hand, primary information, which is continuously updated, instead of relying mainly on publicly available reports. This necessitates the development of strategies for continuous collecting and checking of data. This is presently implemented through i) the provision of tools to enable crowdsourcing from the public, and ii) the establishment of partner networks of key resource individuals and organisations in host countries.

BEYOND THE MEASUREMENT OF THE LARGE-SCALE LAND ACQUISITION PHENOMENON – THE LAND MATRIX GLOBAL OBSERVATORY AS A TOOL FOR OPEN (DATA) DEVELOPMENT

Important to emphasize is the contribution of the Land Matrix Global Observatory to broader objectives. As such, the Land Matrix Global Observatory is more than a tool to assess the scale of LSLA. By contributing to the visualization of large-scale land acquisition projects and providing information and public access to previously hidden data and restricted sources, the Land Matrix Global Observatory hopes to reach its twin goals of improving the quality and inclusiveness of international and national policy dialogue and decision-making on land resources, and involving direct stakeholders in the dialogue and decision-making processes through active participation.

The Land Matrix Global Observatory as a tool of open data invites broader stakeholder engagement. This is done in particular through its crowdsourcing instrument, but also through the direct engagement with investors and governments. All stakeholders are encouraged to contribute to information dissemination through the Land Matrix Global Observatory and to engage with each other, contributing subsequently to more inclusiveness and eventually to innovative and more inclusive governance structures. The Land Matrix Global Observatory thus aims to contribute to embracing a new development paradigm towards open (data) development.



GET THE DETAIL

THE DYNAMICS OF THE LAND RUSH: HIGH DEMAND AND RELATIVELY HIGH RATES OF FAILURE

The area under concluded deals is high with 755 deals concluded since 2000 covering 32.6 million hectares worldwide. This area is lower than earlier estimates, as it represents concluded deals targeted at low and middle income countries.

INTERNATIONAL LAND ACQUISITIONS ACCORDING TO NEGOTIATION STATUS

	Number of cases	Intended size (in million ha)	Size under contract (in million ha)
Oral agreement	58	3.3	0.8
Contract signed	697	51.6	31.8
Concluded deals	755	54.9	32.6
Expression of interest	32	5.1	n.a.
Under negotiation	113	5.7	n.a.
Intended deals	145	10.8	n.a.
Negotiations failed	38	3.7	n.a.
Contract cancelled	12	1.2	1.1
Failed deals	50	4.9	1.1

- The aggregate global demand for land is high, with a large number of deals still pending.
- Intentions/announcements generally exceed actual contract size by far.
- A significant number of deals fail (particularly very big deals) at the negotiation stage.

Data as of 5 June, 2013

THE DYNAMICS OF THE LAND RUSH: SLOW BUT ON-GOING IMPLEMENTATION ON THE GROUND

Although a significant number of deals are concluded and progress to operating stages, little of the contracted land actually goes into production.

INTERNATIONAL LAND ACQUISITIONS ACCORDING TO IMPLEMENTATION STATUS

	Number of concluded deals	Size under contract (in million ha)	Current size under production (in million ha)
Project not started	49	3.4	n.a.
Startup phase (no production)	69	2.4	n.a.
In operation (production)	323	12.0	1.7
Project abandoned	35	2.1	n.a.
No information	279	12.4	n.a.
Total (deals or ha)	755	32.3	1.7

- An important number of deals starts operating on a contracted area of 14.4 million ha.
- So far, only little area actually come under production (1.7 million ha, i.e. only about 5 %).
- Significant failures at implementation stage can be observed.

Data as of 5 June, 2013



AFRICA'S AND SMALLHOLDER'S LAND IS BEING TARGETED

The data confirms that sub-Saharan Africa is the most targeted region. Yet, South-East Asia is also heavily targeted. This being said, dynamics differ considerably across countries. Here are some examples from single countries:

- Several LSLA that come into operation (albeit often only on much smaller areas than under contract) are found for instance in Indonesia, Democratic Republic of Congo, Mozambique and Ethiopia.
- South Sudan has large areas under concluded contracts, but little implementation. The large scale of concluded contracts is (in part) caused by a single deal where a company (from the United Arab Emirates) acquired land of 2.28 million ha (a national park without known operational status).
- Papua New Guinea features many forestry projects.
- Madagascar's presence in the top 10 target countries because of two large projects that have been abandoned (together amounting to over one million ha).

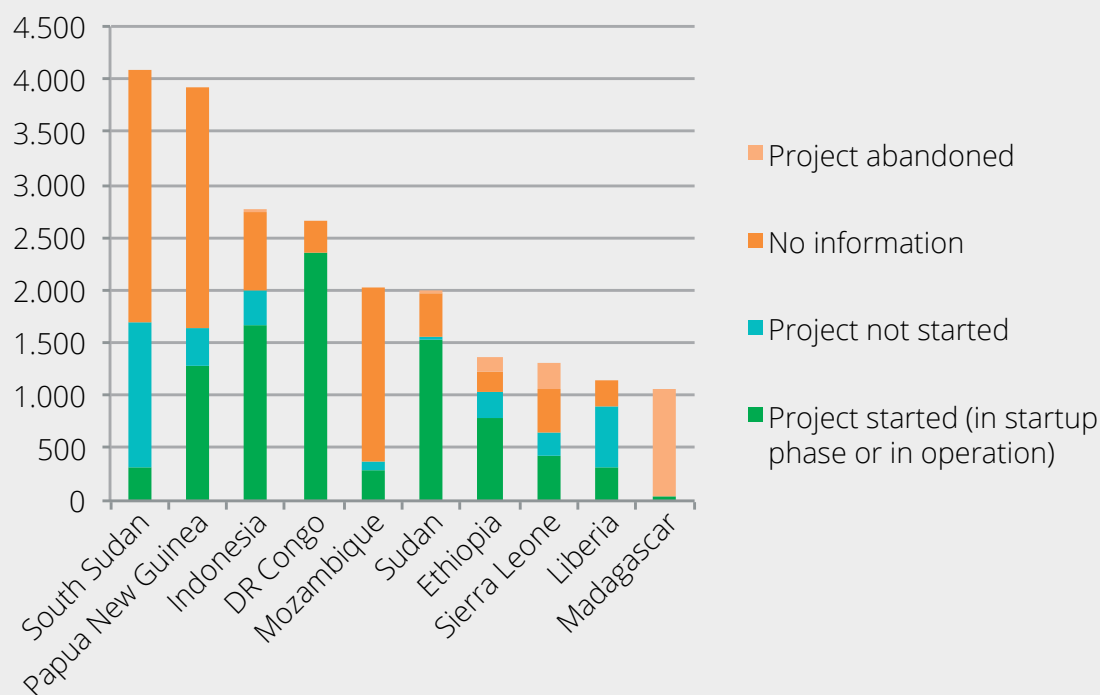


Figure: Top 10 target countries – Concluded international land acquisitions according to implementation status (in 1000 ha)

Data as of 5 June, 2013

FORMER LAND USE	Number of concluded deals	Size (in thousand ha)
Commercial (large-scale) agriculture	42	1180
Smallholder agriculture	56	1041
Pastoralists	6	397
Forestry	15	746
Conservation	5	152
No information	631	29034
Total	755	31370

Data as of 5 June, 2013

Often, land used by smallholders appears to be targeted but information on the precise location and former use of the land is scarce. This illustrates the complexity and practical difficulties of gathering data on land deals.



FOOD CROPS ARE PRESENTLY THE MAIN DRIVER OF THE LARGE-SCALE LAND ACQUISITIONS

The data shows that while biofuel production is important, food crops account for a larger share of deals and area. Forestry and tourism are also important sources of demand for land.



Figure: Main drivers of large-scale land acquisitions

Data as of 5 June, 2013



GET INVOLVED

Visit the website

Visual summaries that provide insight about the phenomenon, and direct access to the dataset for in-depth exploration and analysis.
www.landmatrix.org

For more information

Also see: "Creating a public tool to assess and promote transparency in global land deals: The experience of the Land Matrix" – To be published in the Journal of Peasant Studies.

Help us grow

The Land Matrix data depends on the contributions of all. To enhance the data, visit www.landmatrix.org/get-involved or write to data@landmatrix.org

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